



The Materials for the Future Foundation

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May 23, 1997

Caren Trgovcich, Deputy Director
Waste Prevention and Market Development
Integrated Waste Management Board
8800 Cal Center Drive
Sacramento, CA 95826

Dear Caren,

In response to your request for contract concepts for marketing of the Recycling Market Development Zones, the Materials for the Future Foundation is submitting a two-page proposal for two California Recycling Investment Forums. We believe that investment forums provide an excellent opportunity to bring together investors and recycling manufacturers, to heighten the financial community's interest in recycling businesses, and to highlight the value of the RMDZs and the loan program to both investors and recycling companies. We envision the RMDZs as being very active co-sponsors of the investment forums.

We believe this is an innovative approach to marketing the RMDZs to the financial and business communities. However, if you believe this concept is best pursued through some other mechanism, we would very much appreciate the opportunity to meet with you to discuss additional options.

Please feel free to call me or Coy Smith at (415) 561-6530 if you have any questions or comments.

Sincerely,

Kivi Leroux
Program Director

cc: Paul Relis
Wesley Chesbro
Daniel Pennington

California Recycling Investment Forums
Proposed by the Materials for the Future Foundation

Introduction

The Materials for the Future Foundation (MFF) proposes to conduct two California Recycling Investment Forums for entrepreneurial source reduction, recycling, composting and reuse companies (one in Northern California and one in Southern California). The Investment Forums will bring together a range of investors and financial institutions with promising firms in need of additional capital. By educating and connecting investors and entrepreneurs, new business start-ups and expansions will be more readily financed. The forum will help to address the inefficiency of the current capital markets for private equity and subordinated debt investment. By screening and publicizing companies to targeted investors and financial institutions, the forum will create an identifiable market for investing in entrepreneurial waste reduction ventures. With initial success, the forum could be repeated on an annual basis, becoming financially self sufficient through increasing levels of sponsorship and registration fees.

Key Tasks

- 1) Recruiting investment networks, associations, recycling market development agencies, and other organizations as project partners (Months 1-3)
- 2) Soliciting forum sponsorships from financial institutions, corporations, and governmental entities (Months 2-4)
- 3) Arranging forum site, date and logistics, perhaps in conjunction with an existing investment conference (Months 3-4)
- 4) Soliciting business applications and business plans from waste reduction businesses seeking additional capital for operations (Months 5-7)
- 5) Reviewing, selecting, and training business presenters with assistance from project partners (Months 7 - 9)
- 6) Recruiting registrants from a range of capital sources through investor networks, databases, organizations, and direct contacts (Months 2-9)
- 7) Conducting the Forum with high quality business presentations and waste reduction investment speakers (Month 10)
- 8) Evaluating the success of the Forum immediately with attendees and six months later with participating businesses in terms of additional capital raised (Months 10-16)
- 9) Assessing the potential for an annual Investment Forum, based on project evaluation and results (Months 10-12)

Project Team

The Materials for the Future Foundation has well-established relationships with the organizations who have implemented investment forums in the Northeast and South. MFF will seek additional partners once seed funding for the event is secured. These may include several of the following financing organizations, many of which have already expressed interest:

- Business for Social Responsibility
- Environmental Business Cluster (in Silicon Valley)
- Business Environmental Network
- Progressive Asset Management
- Environmental Capital Network
- Investors' Circle
- Lenders for Community Development
- National Development Council
- Pacific Venture Capital Network
- Social Investment Forum
- The Capital Network

Budget

MFF estimates a total project cost of \$53,000 for two forums. The costs could be off-set in the following ways:

- Registration fees charged to investors and participants, at \$100 per attendee
- Presenter application fees of \$25 - \$50 per company will be charged to assure company interest in the forum and to help cover application and business plan review costs
- Sponsorships from financial institutions, law firms, recycling corporations and other interested parties.

A detailed proposal and project budget can be provided upon request. For more information, please contact Coy Smith, Executive Director, or Kivi Leroux, Program Director, at (415) 561-6530.